



# Tech Alert

from the Customer Delivery Division  
"Your Gateway to Technology Services"

## TA 16-07: Microsoft Office 365 Process and G4 Licensing Restrictions

**ISSUE DATE:** March 14, 2016  
**ATTENTION:** All Customers  
**ACTION REQUESTED:** Follow the specified process  
**DUE DATE:** Informational Only

### Overview:

The California Department of Technology (CDT) now offers Microsoft Office 365 (O365) licenses to its customers. The O365 licensing portfolio has licensing bundles that include a variety of office productivity tools (e.g., email, Microsoft Office, collaboration tools, and storage). Please see [Tech Alert 16-02](#) for additional details. This Tech Alert is intended to specify the process customers should follow when acquiring O365 licensing and to clarify the license restrictions for the G4 option.

### Process for Obtaining O365 Licenses:

Please use the following process for obtaining licenses:

- Step 1. Identify Purchase Date: Determine when your organization will be ready to purchase O365 licenses--this fiscal year or next fiscal year. If that date is within the next 90 days, please proceed to Step 2.
- Step 2. Contact Microsoft Account Executive: Customers should contact their Microsoft Account Executive to review their current licensing portfolio and determine which licensing products (SKUs) are needed to migrate to the Government Community Cloud.
  - a. Microsoft Contacts Reseller: The Microsoft Account Executive will work with the reseller to provide monthly pricing estimates.
  - b. Reseller Provides Cost Estimate: The reseller will send the price estimate to the customer, which will include the state administrative fees, on a separate line item.
- Step 3. Submit Service Request (SR): Once a price estimate from the reseller is received, prepare the SR, as a commitment to buy, and include the following information:
  - a. Title the SR "O365 License Request"
  - b. Specify user count for each license product (e.g., G1, G3, or G4), including the SKUs and the price estimate. *Please note: the SR will not be processed if this information is not provided.*
  - c. Attach the "Microsoft Enrollment Request Information" Excel document. Providing this at the submission of the SR will speed the receipt of licenses.
- Step 4. Allow Processing of Request: Once all of the above information is submitted, customers should allow ten business days for processing time.

Customers must have O365 licenses prior to requesting Email migration services. California Email Services (CES) customers will be given priority in email migration. Customers should expect an overlap in their current email environment and O365. That overlap timeframe will depend on how long it takes customers to remediate any issues preparing for their email migration. To begin email migration, customers should do the following:

- Complete and return the "Email Migration Prioritization Survey" sent on February 23, 2016.

[Survey](https://survey.webapps.ca.gov/TakeSurvey.aspx?SurveyID=I201692) — <https://survey.webapps.ca.gov/TakeSurvey.aspx?SurveyID=I201692>

- Submit an SR titled: “O365 Email Migration Services” and include:
  - SR number for your O365 license request
  - Verification that your O365 licenses have been procured
  - Number of estimated users
  - Number of estimated mailboxes
  - Estimated cost of the migration

Although CES customers will receive priority in email migration to O365, CA.mail and on-premise email customers can still obtain their O365 licenses and use the other components of the service bundle.

### **License Restriction:**

The O365 G4 service bundle includes Unified Communication tools, which is also offered as part of CALNET 3 contracts. Specifically, CALNET 3 Categories 1.2 and 2.0, offer Collaboration and Unified Communication tools that provide most, if not all of the functionality included in the O365 G4 service bundle. Since CALNET 3 is mandatory for Executive Branch agencies, the O365 G4 bundle is only available to the following:

- Non-Executive Branch customers (e.g., constitutional offices, local government, higher education organizations, etc.)
- Departments with approved on-premises PBX systems.

If you need assistance in determining your eligibility to procure the G4 service bundle, please contact your CDT Account Lead.

### **Action Requested:**

Customers should use the above process when requesting O365 licenses.

### **Due Date:**

Informational only.

### **Contact:**

If you have questions or need further clarification, please contact your CDT Account Lead by using the [Account Lead Lookup](#), or call the Customer Delivery Division at (916) 431-5476.